



ePM News

Volume 2, Issue 8

electronic Program Management, Utah Department of Transportation

April 2006

How to Create Custom Reports Using ePM Data

Do you need project information? Need it sorted a certain way? You can create your own custom reports, graphs and charts using ePM data.

Some ePM reports can be created as a text file which can be imported into Microsoft Access or Excel. These reports have an [Export] button on the report request form. Currently the reports with this capability are:

- 210 "Employee Hours by PIN"
- 214 "Org Charge Summaries"
- 215 "PE Budget Comparison"
- 216 "Employee Reported Hours Summary"
- 555 "Project Delivery List"**
- 561 "Active PreCon Projects"
- 564 "Data Quality Report"**
- 565 "Utility Activity Schedule"
- 566 "Projects by STIP Year"
- 650 "Gantt Data MPS (Excel Template)"
- 680 "Region One Data Extract"
- 681 "Region One RUE (R/W, Utilities, Envir)"
- 685 "Construction and CE Costs"
- 686 "Comparison PE and CE Costs to Construction"
- 688 "Local Government Cost (Export Only)"
- 690 "Active PE Projects by Region"

In the Project Management module, go to Screen 861, "Report Generator." Double-click the title of any report. If the report can be exported, the request dialog has an [Export] button.

Click [Export] to export the report. Save the report as an Excel spreadsheet. Open Excel. Open the spreadsheet. Now you can sort, filter, delete or arrange the data however

you need it. You can create graphs and charts for your own purposes.

Contact the ePM team if you have questions about reports or exporting data.



Holiday Leave on Screen 200, "Time Sheet Entry"

ePM automatically enters eight hours of holiday leave in the Regular Hours field on the day of a holiday.

However, not everyone gets eight hours of leave on a holiday. Part-time, seasonal or temporary employees may not be eligible for holiday pay.

FINET compensates for this automatic entry by adjusting the total hours based on each employee's schedule code and employee ID number. Even so, some managers have told us they do not feel comfortable signing these timesheets. So here's how you can remove those hours. See the screen image below.

Choose "Leave" from the three choices on the screen. Enter "H" in Leave Code field and press [Enter] to open the Payroll Hours fields at the bottom of the screen.

Either of the methods shown below can be used to edit or delete any record on this screen:

(1) To adjust or delete the holiday hours, click to highlight the number in the field. To adjust the hours, type the desired number over the highlighted 8. To delete the hours, press the [Delete] key on your keyboard.

(2) Click on the Day/Date Bar (e.g. Mon 02/20/06) above the Day/Date Field in the lower part of the screen. The Holiday Leave hours are displayed in the Daily Summary area at right of the screen.

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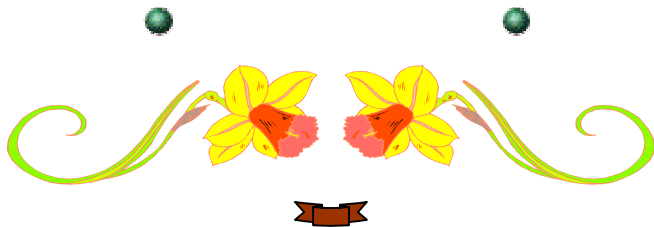
- 1 Custom Reports From ePM Data
- 1 Holiday Leave on Screen 200
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- 2 New Addition to the ePM Help System

Click the PIN field of the record you wish to delete. This activates the [Delete] button in the Daily Summary box.

Click [Delete] to remove the Holiday Leave hours.

The screenshot shows the ePM Time Sheet Entry interface. At the top, there's a header with 'ePM Home', 'Help', and 'Window'. Below that, a status bar indicates the system will be locked out at 04:06:08 15:00. The main area is divided into several sections: 'OrgSub Org', 'Mgt Unit', 'Employee Name', 'Print Timesheet', and a date range selector. The 'Daily Summary' table is visible, showing columns for PIN, Acty, JobProj, DU, Pay CD, Reg Hrs, OT Hrs, and Total. A green arrow labeled '2' points to the 'Delete' button in this table. To the left, the 'Payroll Coding Block' shows 'Leave' set to 'H' (Holiday Taken). Below this, there are 'Payroll Hours' tables for two weeks, showing dates from SAT 02/11/06 to FRI 02/24/06, with columns for Reg, OT, and Day Total.

**One half hour is the smallest time increment
ePM will accept for timesheet entry.**



**The ePM Team are willing and available to come to
other UDOT locations to provide training or assistance
with the system, project setups, payroll, or whatever is
needed. Please contact us for details.**

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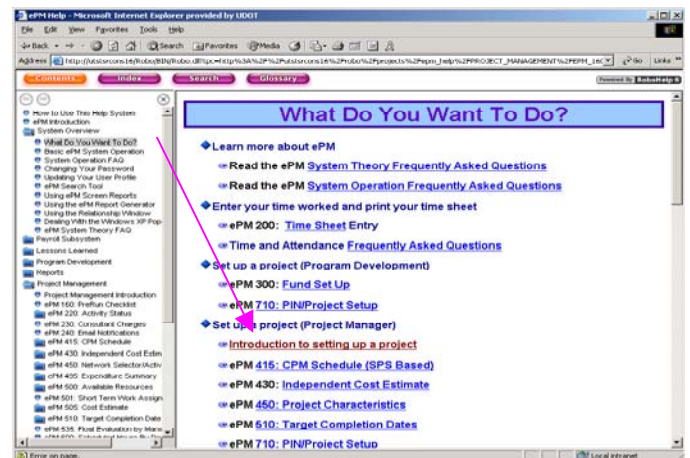


New Guide Located In The ePM Help System!

The new Guide To Setting Up A Project can now be accessed through ePM Help. The Guide provides a quick explanation of the screens for new Project Managers and Consultants to set up and update projects on ePM.

Click on **Help** on the menu bar and the **Help** again on the pull down menu to locate the guide.

- (1) In the Table of Contents click on "System Overview" and then "What Do You Want To Do."
- (2) Click Introduction to setting up a project located in the right column to view the guide.



A link to the guide can also be found in the Project Management section. Click on the Project Management Introduction and then click on guide to setting up a new project.

